Release Notes - September, 2026

Last modified on 10/30/2026 12:38 pm EDT

This release brings EverHealth Scribe BillingAssist to every practice, along with refunds that stay tied to the original payment, ThoughtSpot.AI reporting, and a more powerful Outgoing Prescriptions report. It also brings the updated Message Center, with threaded patient conversations, to every practice. Early access expands with real-time claim submission, the Stripe S710 terminal, and In-Chart Clinical Notes.

Release date: October 14, 2026

In this release: ⚡ Platform & Reliability · Billing & Revenue Cycle · Practice Operations · ⚖ Compliance & Regulatory · Clinical · Early Access

Affected practice roles: Front Desk · Practice Admins · Office Managers · Billing Staff · Prior Auth Coordinators · Providers · Clinical Staff · RNs & MAs

⚡ Platform & Reliability

Know right away when someone new gets access to your practice

Available now

Front Desk · Practice Admins · Office Managers · Everyone

Whenever a new provider or staff user is created for your practice, users with the **Manage Staff** permission now get a Message Center alert, so access is never granted without the right people knowing.

- Each alert shows the new user's name, role, and when they were created
- If no one has **Manage Staff**, the alert goes to the Primary Provider

No action required

Alerts appear automatically in the Message Center.

Create Staff Accounts

Also improved

- Your sign-in session now stays in sync across every DrChrono browser tab you have open

Billing & Revenue Cycle

Issue refunds that stay tied to the original payment

Available now

Billing Staff · Prior Auth Coordinators

Refunds now link back to the payment they came from, across card, check, cash, and manual payments, and reverse that payment's allocation automatically, so your patient balances stay accurate with no cleanup.

- Every refund is tied to its original payment
- No unallocated balances left behind after a refund
- A guided refund window checks your entries before you submit

Heads up

This applies to refunds you issue from now on. Refunds issued before this release aren't changed.

Refund Patient Cash and Check Payments

See which prior authorizations need your attention, right from the Message Center

Available now

Billing Staff · Prior Auth Coordinators | Providers · Clinical Staff · RNs & MAs

The Prior Authorization tab in the Message Center now shows a **PA Status** column for every electronic prior authorization, so you can spot the requests that need an action or an answer without opening each patient's chart.

- Know at a glance which requests need follow-up
- Status matches the patient's **Authorizations** tab in Demographics

Your built-in reports move to ThoughtSpot.AI

Available now

Billing Staff · Prior Auth Coordinators

Financial Transaction, Aging A/R Analysis, and Product & Procedure reports now run on ThoughtSpot.AI for all practices, giving you faster, more flexible reporting in one place. The remaining 17 reports, including Denial Analysis and Payer Mix, follow later in October.

- Save your filters and views
- Schedule reports to run automatically
- Explore the data behind any report without building a new one

Also improved

- Archiving a payer enrollment now automatically cancels any enrollment request still in process
- Protective Insurance Co. is now available as a workers' compensation payer, with payer ID **E1568**
- You can now add a billing description for CPT **58578** in your fee schedule

Practice Operations

Keep every patient conversation together in the updated Message Center

Available now

Front Desk · Practice Admins · Office Managers | Providers · Clinical Staff · RNs & MAs

The updated Message Center groups patient messages into conversations and moves to a new, modernized navigation, so you can follow a whole conversation in one place instead of searching the inbox for earlier context.

- Earlier messages on the same topic appear together in one thread
- This new layout is setting the foundational design that will expand to additional sections, like fax, in the future.

Heads up

The updated Message Center is rolling out to practices in phases starting October 26, with full availability by the end of November.

⚖ Compliance & Regulatory

Build detailed controlled-substance reports from Outgoing Prescriptions

Available now

Providers · Clinical Staff · RNs & MAs

New filters on the Outgoing Prescriptions report let you pull every prescription for specific medications, controlled-substance schedules, patients, or pharmacies over up to two years, then export the results for state reporting.

- Search for several medications at once, by brand or generic name
- Filter by schedule (I–V), patient state or ZIP code, patient group, and pharmacy state
- Export includes dosage, quantity, days supply, prescriber, and pharmacy details

Outgoing Prescriptions Report

Also improved

- The 2027 ICD-10 code updates and new HCPCS codes effective October 1, 2026 are now available

Clinical

Get billing-rule-aware CPT code suggestions with EverHealth Scribe BillingAssist

Available now

Providers · Clinical Staff · RNs & MAs | Billing Staff · Prior Auth Coordinators | EverHealth Scribe

EverHealth Scribe BillingAssist suggests CPT codes within its AI-drafted assessments and diagnosis lists, following billing rules, and every practice can now turn it on.

- CPT suggestions arrive with the assessment and diagnoses Scribe drafts
- BillingAssist doesn't yet factor in your DrChrono billing profiles or CPT automation from clinical form fields, so review the codes in DrChrono after sending them to the EHR

Setup required

Turn it on in EverHealth Scribe settings under **Preferences** > **Turn On Billing Assist**.

EverHealth Scribe Billing Assist | EverHealth Scribe Billing Assist: Coding Recommendations

Fill in pronouns and referring physician names automatically with new macro variables

Available now

Providers · Clinical Staff · RNs & MAs

Two new demographic variables for macro buttons pull the patient's objective pronoun and their referring physician's name straight into your clinical notes, so you no longer type them by hand.

- A **him/her** pronoun variable, with uppercase and lowercase options
- ✉ **Referring Doctor First Name** and **Referring Doctor Last Name** variables for consult-letter salutations

Creating and Using Macros

As part of this release, we are continuing our ongoing work to assess, monitor, and address any security vulnerabilities.

Early Access

Features available to select practices now. Contact us to join.

Billing & Revenue Cycle

View the CMS-1500 or UB-04 form for submitted claims

Early access · Full availability end of October 2026

Billing Staff · Prior Auth Coordinators

A new **View HCFA/UB-04** button next to **View EDI** in a claim's billing log shows the actual claim form that was submitted: the CMS-1500 for professional claims and the UB-04 for institutional claims.

- See exactly what went out on the claim form without leaving DrChrono
- Have the form in front of you when you answer payer questions or work a rejection

Heads up

This view is available for claims submitted electronically through DrChrono.

View Billed Claim Details

Send claims every 15 minutes instead of twice a day

Early access · Full availability November 2026

Billing Staff · Prior Auth Coordinators

Real-time claim submission sends your ready claims every 15 minutes instead of waiting for the batch that runs every 12 hours, so you get paid sooner and see rejections the same day.

- Claims go out within about 15 minutes of being ready
- Catch and correct rejections the same day

Heads up

Real-time submission is on by default as it rolls out. If you need to, you can switch back to 12-hour batch submission in your settings.

Real-Time Claim Submission

Take in-person card payments on the Stripe S710 terminal

Early access · Full availability November 2026

Billing Staff · Prior Auth Coordinators | Front Desk · Practice Admins · Office Managers

The Stripe S710 terminal connects directly to DrChrono Payments, so you can take chip, tap, and swipe payments at checkout on web, the EHR app, and the Check-In app, with each payment recorded automatically.

- Chip, tap, and swipe on a Wi-Fi-enabled terminal
- No separate POS to reconcile against DrChrono

Setup required

Requires DrChrono Payments + Stripe and a Stripe S710 terminal.

S710 Card Reader Quick Start Setup Guide S710 Card Reader Troubleshooting S710 Card Reader:

Collect a Payment · S710 Card Reader: Manage Your Devices · Stripe S710 Card Reader Overview

Generate patient statements office by office

Early access · Full availability November 2026

Billing Staff · Prior Auth Coordinators

Multi-location practices can generate a separate patient statement for each office instead of one combined statement, so each statement is routed to the right merchant account and reconciled by location.

- One statement per office, routed to that office's merchant account
- Patients see which office each statement belongs to in OnPatient

How Office-Based Statements Appear to Patients in OnPatient · Setting Up and Generating Office-Based Patient Statements · Setting Up Office-Level Merchant ID Payment Routing for Patient Statements

Practice Operations

Work incoming faxes faster in the updated Message Center

Early access · Full availability December 2026

Front Desk · Practice Admins · Office Managers

Providers · Clinical Staff · RNs & MAs

A rebuilt Incoming Fax section in the Message Center adds an inline preview panel and a new workflow for associating a fax with a patient, so you can file faxes without opening each one.

- Preview each fax right from the list
- Associate a fax with a patient in a few clicks
- Read and unread, archive, assign, and download all carry over

Manage practice settings and permissions on redesigned pages

Early access · Full availability November 2026

Front Desk · Practice Admins · Office Managers

Office, Facility, Provider, Staff, and Roles & Permissions settings move to redesigned pages with the new EverHealth look and simpler permission management.

- Settings that are consistent and easier to work with
- Simpler permission management

Manage Practice Settings

Clinical

Document in the clinical note and the patient chart in one window

Early access · Full availability January–March 2027

Providers · Clinical Staff · RNs & MAs

In-Chart Clinical Notes brings the clinical note and the patient chart together in one window, so you no longer switch back and forth while you document.

- Chart and note side by side as you document
- Search your macros right from the note

Keep EverHealth Scribe's formatting in your clinical notes

Early access · Full availability January–March 2027

Providers · Clinical Staff · RNs & MAs | EverHealth Scribe

The yellow sticky note in the clinical note now supports rich text, so formatting from EverHealth Scribe comes through intact and you can edit it in place.

- ✍ Scribe formatting carries into DrChrono as is
- Edit with formatting right in the note, so notes look the same in Scribe and DrChrono

Give every After Visit Summary a home in the clinical note

Early access · Full availability January 2027

Providers · Clinical Staff · RNs & MAs | EverHealth Scribe

After Visit Summaries now have their own template form in the clinical note on the web, filled in from EverHealth Scribe or by hand if you don't use Scribe, so the summary lives with the visit.

- Scribe-generated summaries land directly in the note
- ✍ Practices without Scribe can fill in the form manually

Resources

Release changelog

See all bug fixes — Resolutions - September, 2026 (Web)

Interactive walkthroughs

Step-by-step demos for new features — linked from each section above.

⍰ EverHealth Scribe Billing Assist

Have questions?

Contact DrChrono Support for help with any feature in this release.